Concerns and Regional Developments over Türkiye's Energy Security

Türkiye'nin Enerji Güvenliğine İlişkin Endişeler ve Bölgesel Gelişmeler

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Abstract

Türkiye, despite its limited domestic energy resources, occupies a strategically significant geographical position that enhances its role in global energy geopolitics. Situated at the crossroads of energy-rich regions in the Middle East and the Caspian Basin, as well as energy-dependent Europe, Türkiye has become a vital transit route for energy supplies, particularly natural gas. The geopolitical landscape has shifted following the 2022 Russian invasion of Ukraine, underscoring Türkiye's potential importance in strengthening European energy security as the EU seeks to reduce its reliance on Russian energy. Rather than merely serving as an energy transit corridor, Türkiye's political leadership aims to leverage its geopolitical advantages to enhance domestic energy security and establish the country as a regional energy hub, facilitating trade between international energy market participants.

Key Words: *Concerns, Regional Developments, Türkiye, Energy Security, Energy Market.*

Öz

Türkiye, sınırlı yerel enerji kaynaklarına rağmen, küresel enerji jeopolitiğindeki rolünü artıran stratejik olarak önemli bir coğrafi konuma sahiptir. Orta Doğu ve Hazar Havzası'ndaki enerji zengini bölgelerin ve enerjiye bağımlı Avrupa'nın kavşağında bulunan Türkiye, özellikle doğal gaz olmak üzere enerji tedarikleri için hayati bir geçiş rotası haline gelmiştir. Jeopolitik manzara, 2022'de Rusya'nın Ukrayna'yı işgal etmesinin ardından değişmiş ve AB'nin Rus enerjisine olan bağımlılığını azaltmaya çalışmasıyla Türkiye'nin Avrupa enerji güvenliğini güçlendirmedeki potansiyel önemini vurgulamıştır. Türkiye'nin siyasi liderliği, yalnızca bir enerji geçiş koridoru olarak hizmet vermekten ziyade, jeopolitik avantajlarından yararlanarak yerel enerji güvenliğini artırmayı ve ülkeyi bölgesel bir enerji merkezi haline getirerek uluslararası enerji piyasası katılımcıları arasındaki ticareti kolaylaştırmayı hedeflemektedir.

Anahtar Kelimeler: *Endişeler, Bölgesel Gelişmeler, Türkiye, Enerji Güvenliği, Enerji Pazarı.*

Introduction

The plan for Türkiye to become a regional energy hub has opened up wide academic, policy, and political discourse. Varying interpretations on the feasibility of this goal have emanated from several studies conducted since the early 2010s analyzing the country's potential to play a pivotal role in energy trade. It is actually these analyses that have already created room for optimistic assessments as well as somewhat more careful and skeptical views.

The current academic debate on Türkiye's ambition to become an energy hub underlines several factors that work in its favor. Scholars have con-

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tinuously noted the country's strategic location between the East and West, relatively stable and friendly surrounding states, and increasing needs among both energy-producing and energy-consuming countries for diversified and safe transit corridor options.

Another extensive body of literature enumerates several problems that stand in the way of Türkiye becoming a real energy hub. These include, as noted by scholars, inadequate capacity in the Southern Gas Corridor, certain domestic energy regulations, and the non-liberal nature of the internal energy market. The list expands when put in a wider geopolitical and structural context with such issues as internal security threats against the country, strained relations with the European Union, falling natural gas demand from Europe, increasing LNG prominence in global markets, continued instability in Syria and Iraq, deficiencies in Turkish energy infrastructure, international isolation of Iran, and access to Eastern Mediterranean gas for Türkiye. All these factors add up to create a very tough environment for this country's hub ambitions.

Although there is an abundance of literature concerning Türkiye's ambitions to establish itself as an energy trading hub, a significant void remains in the form of a thorough systematic review. As of now, there has been no comprehensive assessment conducted to analyze Türkiye's transboundary energy initiatives and the various discussions related to its quest for regional energy hub status.

In striving to achieve these goals, we aim to enhance the current literature by providing a comprehensive examination of Türkiye's transboundary energy transit framework. This examination will shed light on the nation's energy policies and expand their potential implications.

It attempts to deepen academic understanding of Türkiye's changing place in the international energy system by reviewing its traditional role as an energy transit corridor and new practices aimed at repositioning itself as a regional energy trading hub. Past and present cross-border energy projects and related debates are used to demonstrate how geography, geopolitics, and energy security concerns interact intricately. This paper argues that Türkiye occupies a central position in regional energy politics at a time of fundamental transformation of the world's energy order.

This research is based on the theoretical framework of classical geopolitics, specifically emphasizing the geopolitics related to energy.

This paper falls naturally into four parts. The first draws upon the realist–liberalist debate in energy to develop a conceptual framework for identifying the main determinants of Türkiye's external policies on oil and natural gas. The second discusses and analyzes the major factors that determine Türkiye's

energy-related foreign policy, including how these elements interact with one another. The third attempts to reassess these determinants in terms of the broader theoretical approach of this study, which relates Türkiye's aspiration to act as an energy hub with changing regional dynamics. The final section will offer an overall conclusion together with some policy prescriptions for Türkiye.

Energy in the Context of Realism and Liberalism

Energy diplomacy covers a range of topics such as rules regarding energy resources, energy prices and efficiency, energy infrastructure and production, use and energy transition, and relations regulated by energy. Energy is a political area that is effective in many arenas such as agriculture, climate, development, economy, environment, and foreign relations. Geography is an important issue in energy politics, but this does not mean an immutable geographical area as in geopolitics. In energy politics, the geographical area is an area that can be changed, used, and recreated. For example, an area that was not previously planned may become geopolitically important due to its location on a pipeline route[1].

A clear grasp of energy security is essential for understanding the dynamics of energy diplomacy. At its core, energy security refers to the uninterrupted and reliable delivery of energy resources from producers to consumers through safe routes and at market-stable prices. The oil shocks of the 1970s made evident how critical this issue is for states, marking a turning point after which energy concerns became integral to national and international security agendas, particularly in the post–Cold War era.

This era, meanwhile, was the peak of the Cold War when the overall global political order significantly directed the foreign policy choices of states. The last stage runs from 1990 up to today; a time of tremendous change in the international system. In these years great changes took place in the system together with more intense argument concerning political and institutional arrangements at home.

Energy security is best made sense of in the context of energy diplomacy. Rational states define their energy policies within the provisions of insurance on energy security. While energy producing states try to maximize their interests in terms of price when transferring the energy they produce, dependent states on foreign energy define their energy policies within the provisions of insurance on secure transfer of energy. There exists another common energy security problem for both the producing and consuming countries — it is about the route of those pipelines through which the energy will be transferred. Details on this will be provided in the next sections.

1 Göknil Erbaş Doğan, Karadeniz Bölgesinde boru Hatları Jeopolitiği. Karadeniz Araştırmaları, 57, 2018.

In fact, it was since the 19th century that energy started being used as a tool of diplomacy. Since from then on, coal became an industrial tool. Later on when oil replaced coal very major transformations took place which were affecting almost the whole world. That's why energy has become an imperative point into the foreign policies of countries since the 20th century[2]. It is true to say that oil has been one of the major factors in the determination of state relations and policies since the 20th Century.

Energy is also an element of conflict and a field of power contest within the rubrics of international relations. The major objectives of countries about energy are to have energy, control of energy resources, and security of the energy flow[3]. Thus, energy has taken its place among the most vital matters of international relations and foreign policies of countries in the past century.

Realism and Liberalism will be compared from this point onward to understand their views on energy policies, energy security, and energy diplomacy. Realism will be discussed first.

Realists argue that, regardless of its source, the nature of the international system is dominated by competition and struggle. Morgenthau explains this situation by saying, "International politics, like all politics, is a struggle for power." For realists, the main tool that the state can use to achieve its goals in the international arena is power[4].

If we need to examine energy diplomacy from the perspective of realist theory, we need to focus on the concept of asymmetric dependency. According to realists, mutual dependency does not bring equality and puts the dependent party at a disadvantage. For example, the energy importing country becomes vulnerable if the energy exporting countries increase prices or impose embargoes. For this reason, there is asymmetric dependency in energy. According to some realists, multinational and state-affiliated energy companies that are active in the energy market are also included in the asymmetric dependency category. Realists consider energy not only from an economic perspective but also from a political perspective and consider it to be one of the main elements of national security[5].

Realism, due to the oligopolistic structure of the energy market, emphasizes the concept of asymmetric dependency and suggests that the foreign policy process should be state-centered. As mentioned above, Realism em-

2 A.g.e. Doğan, s. 57.
3 Ünver Sel, http://ankaenstitusu.com/rusya-ve-kirimda-enerji-kaynaklari-ve-politikalari, Erişim 17.12.2024.
4 Eyüp Ersoy, "Realizm", Uluslararası İlişkiler Teorileri, Ramazan Gözen, İletişim, İstanbul 2019.
5 Pınar İpek, "Enerji Güvenliğinin Ekonomi Politiği ve Türk Dış Politikası", Dış Politika Teorileri Bağlamında Türk Dış Politikasının Analizi Cilt 1, Ertan Efegil, Rıdvan Kalaycı, Nobel Yayınları, Ankara 2012.

phasizes the anarchic structure of the international system. Therefore, according to Realism, the private sector and state oil companies will be inadequate to ensure energy security in the international system and the ultimate responsibility will be in the hands of the state alone[6].

From a realist perspective, energy geopolitics—concerned with understanding the supply of oil and natural gas through geopolitical dynamics—offers a framework for analyzing how geography shapes states' energy capacities and political power. Within this approach, political actors pursue cross-border initiatives to secure the energy supplies needed to sustain their economies, uphold regional and global influence, preserve military capabilities, ensure national security, and maintain territorial integrity and sovereignty. Transit states such as Türkiye gain importance because their geographical position enables the movement of energy from producing countries to consumer markets. These states can use their strategic locations to advance their own national agendas. Similarly, energy-producing countries often employ their resources as instruments of foreign policy. As competition among importing states intensifies, exporters find greater opportunities to increase their relative leverage in the international system.

From this point on, Liberalism will be examined. The foundations of liberal thought date back to ancient times. Liberalism, a thought with a deep-rooted tradition dating back to the ancient Greek and Roman Stoics, speaks of a globalizing world in which there are various types of actors on the international relations scene[7].

Liberal theory places significant emphasis on the role of institutions. In contrast to realism, it rejects the notion that states are the sole actors in international politics. Instead, liberalism expands the scope of actors to include international organizations, non-governmental groups, multinational companies, and even individuals, alongside states.

In this theory, the concept of interdependence defines the nature of interaction between state and non-state actors in international relations and international political economy. It is fair enough to note that liberal theory recognizes the interdependence factor. To be specific, Complex Interdependence falls under liberal theorization as advanced by Keohane and Nye.

Nye and Keohane categorize the Complex Interdependence approach under three main headings. The first is multiple channels. Government officials no longer speak to each other in one single official channel they also

6 Mesut Şöhret, Enerji Güvenliğinin Ekonomi Politiği ve Uluslararası Çatışmalara Etkisi. Beta Yayınları, İstanbul 2015.

7 Paul Viotti, ve Mark Kauppi, Uluslararası İlişkiler ve Dünya Siyaseti, Çev. Ayşe Özbey Erozan, Nobel Yayınları, Ankara 2017.

communicate informally. Besides, intensity of communication does not only lie between government officials but also non-governmental elites and international organizations. The second heading is the absence of hierarchy among issues. The line between domestic and foreign policy has faded. Issues that crowd the international agenda have become extremely varied. Thus, issues related to security will not permanently be in the agenda. The third heading is the declining role of military power.That is, due to increasing interdependence, states hesitate to undertake military intervention against each other[8].

Literature Survey: Concerns over Türkiye's Energy Security

Increasing energy need

When the historical past of countries or regions is examined, they have had various advantages in line with the characteristics they carry. Moreover, they have come to the fore with these advantages. These advantages include; high welfare regions, favorable climate conditions, water resources, fertile agricultural lands, strategic trade routes, access to energy resources or energy transfer points. Energy-rich regions have been central to global power dynamics since the early 20th century. Notably, the oil shocks of 1973 and 1979 heightened concerns over energy security and significantly influenced international relations. In response to these crises, Western countries increasingly turned to nuclear power and renewable energy sources as alternatives to traditional fossil fuels. At the same time, it followed a strong policy that included military force towards the Middle East[9].

Energy has always been a vital element throughout human history. In the early stages, it fulfilled basic physical needs but acquired greater significance in settled, agrarian societies. Today there is an ever-increasing demand for energy in Türkiye while she continues to be heavily import-dependent due to inadequate domestic hydrocarbon resources. However, these resource limitations place Türkiye at a high degree of strategic importance internationally as it can keep energy matters perpetually on top of its policy agenda due to its location. About seventy percent of the oil and natural gas reserves of the world are nearby; she is close to Europe - a major consumer - and has geopolitical importance; therefore, she serves as an important transit channel that energetically connects the Caspian/ Central Asian regions and Middle Eastern energy-rich regions with the European markets placing her in numerous major energy projects. Laying along major pipeline routes has prompted infrastructural development of the energy industry, increasing Türkiye's possibility to

8 Robert Keohane ve Joseph Nye Jr., , "Revisiting Power and Interdependence", uidergisi, c. 12, sy. 46, 2015, ss. 79–104.

9 Muhammed Oral, "Enerji Coğrafyası Perspektifinde Türkiye'nin Enerji Politikaları", Doktora Tezi, Karabük Üniversitesi, Sosyal Bilimler Enstitüsü, Karabük 2017.

serve as a regional energy hub in addition to a wider aspect of energy security. Also, Türkiye itself is a very large energy market; proximity to the neighboring resources adds another dimension toward playing that role. However, geography is not all; human and institutional capacities must be leveraged for this country to achieve its potential as a hub. That includes dynamic labor, military power, and growing economy. Being an energy hub means having elaborated trade environment marked by fluid market structure, high level infrastructure like storage facilities, transparent regulations, and know-how people who can handle complicated flows of energies.

The limited availability of domestic energy resources represents the second major factor contributing to Türkiye's energy security concerns

Before the Industrial Revolution, people met their energy needs mainly by using renewable energy sources . With the Industrial Revolution and the use of fossil fuels, energy has become an indispensable part of production and consumption. A country cannot improve its production level, enhance its international competitiveness, or boost its economic prosperity without energy[10]. The uneven global distribution of fossil fuel resources leads to energy dependence in countries with insufficient domestic reserves. In short, energy dependence refers to the necessity for a country to import energy to meet its economic needs when its local resources are insufficient. According to the Ministry of Foreign Affairs of the Republic of Türkiye (2021), Türkiye occupies a crucial position in the global energy supply chain and has experienced the fastest increase in energy demand among OECD countries over the past fifteen years. Global energy discussions identify a range of key actors, including producers, consumers, transit nations, international organizations, and private sector companies. Within this context, Türkiye acts both as a major energy consumer and as a transit hub linking the energy-rich areas of the Middle East and Eurasia. The country's energy strategy prioritizes enhancing energy security, managing growing domestic demand, and reducing reliance on imported energy sources. By the end of September 2019, Türkiye's installed energy capacity was distributed across various sources as follows: 31.4% hydropower, 28.6% natural gas, 22.4% coal, 8.1% wind, 6.2% solar, 1.6% geothermal, and 1.7% from other sources[11]. As of December 2020, the installed capacity of electricity generation plants in Türkiye is 95 thousand 890 MW[12].

10 Murat Aykırı, Enerjide Dışa Bağımlılık ve Sağlıklı Büyüme: Türkiye Örneği. Aydın İktisat Fakültesi Dergisi, 3(2), 2018, 50-67.

11 T.C. Enerji ve Tabii Kaynaklar Bakanlığı, Bilgi Merkezi: Elektrik. https://enerji.gov.tr/bilgimerkezi-enerji-elektrik, Erişim 17.12.2024.

12 Enerji Günlüğü, https://www.enerjigunlugu.net/turkiyenin-elektrikte-kurulu-gucu-95-890-mwayukseldi-40876h.htm, Erişim 17.12.2024.

Türkiye's heavy reliance on imported oil and natural gas constitutes the third key factor underlying its energy security concerns

When evaluated according to energy type, it is seen that Türkiye is almost completely dependent on foreign sources with 99.09% in natural gas in 2020. According to EPDK data, it is seen that 4 countries stand out in Türkiye's natural gas imports. According to 2020 data, Türkiye receives the largest portion of the natural gas it purchases from Russia with 33.59%. Iran, Azerbaijan and Algeria are other important importers[13].Though not as high as natural gas in the group of petroleum products, there are still high dependency rates. Based on data acquired from the TPAO report for 2021, there is an external dependency running at 92.8%. The important countries in Türkiye's energy imports are Iraq with 42.3%, Russia with 17.3% and Kazakhstan with 14.4%, respectively[14].

External energy dependence falls within the larger concept of energy security at the confluence of economic and geopolitical interests. Historical experience brings to the fore the fact that for states, securing supplies in energy is of critical importance. The vulnerability that was inculcated by a crisis in the fossil fuel sector back in 1973 when what has previously been a relatively balanced market was thrown into disarray aptly demonstrates supply vulnerabilities. Due to the increase in petroleum product prices, there was a contraction in production in countries with external dependency on energy[15].

The limited availability of alternative energy sources represents the fourth major factor contributing to Türkiye's energy security challenges

Türkiye is one of the countries with the highest energy demand. This high demand for energy is at an acceptable level for Türkiye, which wants to increase its welfare level and has a young population. The energy consumption growth rate was determined as 4% between 1990 and 2017. On the other hand, domestic energy supply in Türkiye decreased and there was an increase in the import rate between the years mentioned. While the import rate in energy was 50%, this rate increased to over 70% in 2017. This situation is an indication that national energy production is not sufficient[16].

13 EPDK, Enerji Piyasası Düzenleme Kurumu, Elektrik Piyasası Kurul Kararları, retrieved from https://www.epdk.gov.tr/Detay/Icerik/23-2-3/mevzuat, Erişim 17.12.2024.

14 TPAO, "Türkiye Petrolleri Anonim Ortaklığı, 2022 Petrol ve Doğalgaz Sektör Raporu", URL: https://www.tpao.gov.tr/file/2305/2022-petrol-ve-dogal-gaz-sektor-raporu-14316477389807c65.pdf Erişim 17.12.2024.

15 Serap Elüstü, Avrupa Birliği'nin Enerji Güvenliği: Enerji İthalatı Bağımlılığı ve Ekonomik Büyüme İlişkisi. İstanbul İktisat Dergisi - Istanbul Journal of Economics, 71(1), 2021, 133-162.

16 Özlem Kızıl Voyvoda ve Ebru Voyvoda, Türkiye'de Enerji Sektörünün Yeniden Yapılandırılması Sürecinde Hukuk Düzenlemeleri – Elektrik Sektörü, Çalışma ve Toplum Dergisi, 1 (60), 2019.

The share of energy imports in total imports in Türkiye has varied over the years. This figure, which was 20.97% in 2019, decreased to 14.02% in 2020 due to the impact of the COVID-19 Pandemic. However, it can be predicted that these figures will tend to increase again due to the rebound effect[17].

Domestic energy infrastructure inadequacy is the fifth major reason that surfaces to inspire Türkiye's fears about energy

According to the Ministry of Foreign Affairs of the Republic of Türkiye (2021), key aspects of Türkiye's energy strategy include implementing necessary reforms and liberalization measures, fostering a transparent and competitive market, and enhancing productivity, efficiency, and research and development efforts. Türkiye seeks to go beyond being merely an energy consumer or a transit country; its goal is to become a regional energy hub. Achieving this requires not only a transparent and competitive market environment but also robust legal and financial frameworks that facilitate transactions between producer and consumer nations. Additionally, establishing adequate storage facilities, securing re-export capabilities, and developing sufficient energy infrastructure are essential steps toward realizing Türkiye's ambition to serve as a central energy center.

The final point related to that energy security is renewable energy sources of Türkiye

By the early 1990s, renewable energy contributed about 20% to the total energy supply in Türkiye but it later gradually decreased to below 10% by 2007. It is only since 2009 that targeted initiatives and policy measures have been allowed to drive a resurge of renewables and raise their contribution once more to reach 16.24% of the total energy supply by 2020. With large solar and wind potential capacity, if planned strategically and with proper policies, Türkiye can even surpass previous targets set regarding the share percentage of renewables within the total energy mix. Thus, infrastructure investment is required during this transition period as well as technological solutions that will enable efficient use of energy. Renewable sources must be competitive with fossil fuels; labor training programs for workers in the energy sector moving from fossil fuel-based jobs to those based on renewables must also be instituted; public awareness programs must support all these activities[18].

17 Ali Furkan Orun ve Bünyamin Demirgil, Türkiye'de Yenilenebilir Enerji Yatırımlarına Yönelik Teşvikler ve Yenilenebilir Enerjinin Ekonomik Etkileri, Uluslararası İktisadi ve İdari Akademik Araştırmalar Dergisi, 1(2), 2021.

18 Birol Kayışoğlu ve Bahar Diken Türkiye'de Yenilenebilir Enerji Kullanımının Mevcut Durumu ve Sorunları, Tarım Makinaları Bilimi Dergisi (Journal of Agricultural Machinery Science), 15 (2), 2019.

Regional Developments

The foreign policy of Türkiye on oil and natural gas has been framed by several regional happenings: the breakup of the Soviet Union renewed competition within the Caspian region disputes regarding the Caspian Sea's legality of status wars there was between Russia and Ukraine over gas, and European dependency on Russian gas. The crisis in Syria and energy dynamics also involve Eastern Mediterranean energy issues with Azerbaijan, Turkmenistan, Kazakhstan, Russia, China, Pakistan Iran plus energy issues from the Persian Gulf all these have greatly influenced strategic directions for Türkiye when it comes to dealing with matters about oil as well as natural resources like gases.

The Dissolution of the Soviet Union

After the Soviet Union broke up in 1991, Azerbaijan, Kazakhstan, and Turkmenistan established energy markets of their own. This meant routes to tap into oil and gas riches outside OPEC's control. For international oil companies, the main challenge was how to export these resources from the landlocked countries to Western markets[19]. In this frame, Türkiye first and foremost emerged as a very important transiting country in conveying energy resources of these states to European markets. At the same time, within the Turkish market itself, it has become a potential terminal point for some of those energy supplies.

New Energy Game

The oil potential of the Persian Gulf is not entirely similar to what the Caspian resources could bring, but there is a perception that Caspian resources would help diversify Western dependence away from Middle Eastern and Persian Gulf oil supplies. As a result, some analysts already forecast a kind of new geopolitical competition reminiscent of the 19th-century so-called "Great Game," though involving an entirely different cast of major players: primarily Russia and China, but also (to a much lesser extent) fragmented European Union and United States; regional powers Turkey and Iran are getting more assertive as well. This strategic competition takes place against an old battle between Moscow and Washington for preeminence in the region with sundry local actors aligned on either side. While the West was attempting at conceptualizing new pipelines, an energy corridor made from Eurasia to Europe through Türkiye, Russia took a strategic action of fueling ethnic conflicts within Eurasian states as a response to these initiatives. On the other hand, China's presence in that region has been continuously increasing. From the late 1990s when it turned out to be-and is still-the world's fastest-growing energy resources importer, China gradually extended its access in this Caspian basin. Not only Asian actor interested here; Japan and South Korea-more dependent on im-

19 A.g.e. İpek, ss.173-194.

ported oil and gas than even China-are key players in that regional energy dynamic. India's import demand is growing[20].

The attempts of these countries to import energy resources from the Caspian Sea increasingly challenges Türkiye's plan to be an energy hub between Caspian suppliers and European consumers[21]. Geostrategic interests of the US, Russia, and China come in economic and political conflicts. Creating a Turkish policy that could presumably utilize the advantages coming from this region contains complexity. Any matter—be it real or perceived—that Türkiye significantly puts against the interest of either the US or Russia without any form of alliance with their neighboring countries will result in increased tension between these two powers and Türkiye.

The Dispute over the Caspian Sea

Disputes over the legal and political status of the water body between the five littoral states- Azerbaijan, Iran, Russia, Turkmenistan, and Kazakhstan have prevented many oil and gas fields particularly in the southern part of the basin from development. Even more importantly for a long time until recently it has also held regional cooperation hostage due to such disputes over matters as harmless as fisheries[22]. The main pipeline way that can bring natural gas from Turkmen and oil from Kazakh to Europe via Turkey, without going through Russia, is at the bottom of the Caspian Sea. The legal status of this sea has not been finally defined yet. But it is actually the continuing lack of a final definition on the legal status that greatly limits Turkmenistan and Kazakhstan's energy cooperation with Turkey in raising itself to become a key regional energy hub.

Ukraine-Russia Natural Gas Conflicts

Russia, which wants to become a powerful actor again in the post-Cold War era, has wanted to use energy as a tool. Some developments in Eastern Europe, which includes Russia, have created anxiety in Europe[23].

The gas transit crises of 2006, 2008-09, and 2014 between Russia and Ukraine increased the EU's paranoia about its dependence on Russian gas. Crimea was annexed by Russia in 2014 to further highlight this vulnerability of

20 Andreas Heinrech ve Heiko Pleines, Mixing geopolitics and business: How ruling elites in the Caspian states justify their choice of export pipelines. Journal of Eurasian Studies, 6(2), 2015, 107-113.

21 Adam Balcer, Between energy and soft pan-Turkism: Türkiye and the Turkic Republics. Turkish Policy Quarterly, 11(2), 2012, 151-162.

22 Azad Garibov, Are the littoral states close to signing an agreement on the legal status of the Caspian Sea?. Eurasia Daily Monitor, 14(61), 2017.

23 Mehmet Seyfettin Erol ve Emrah Kaya, Enerji Güvenliği Bağlamında Çin'in Arap Dünyası'na Yönelik Enerji Politikası. Bölgesel Araştırmalar Dergisi, vol.7, no.1, 2023, 86-122.

Europe through dependence. The EU doubled its diplomatic efforts towards the realization of the Southern Gas Corridor project. Türkiye is a central transit country in this project to play an increasing role in energy security for European consumers. It has also made Türkiye very important for Russia due to continuing tension between Moscow and Kyiv, as Russia wants alternative export routes that bypass Ukraine. Hence, it made Türkiye not only a transit hub but promoted active involvement as a participant in international major gas pipeline projects such as TANAP and Turkish Stream.

European Union's Dependence on Russia Gas

The energy relationship between the EU and Russia serves as an example of Complex Interdependence in the theory developed by Keohane & Nye, with two main features of this dependency: sensitivity and vulnerability. There are three major determinants shaping the energy policy of the EU member states competitiveness, security of energy supply, and environment. With a growing economy and enlargement, external dependency on energy resources increases. Therefore, there is an internal policy to diversify the sources of supplied energy to reduce dependency by increasing security. For this reason, Nabucco Natural Gas Pipeline project has been initiated. The plan is to bypass Russia and carry Central Asian gas[24].

Russia is often considered in the background of all these dynamics. In response to the Nabucco pipeline, Russia initiated the South Stream project. While Nabucco aimed to deliver gas from the Middle East and Caspian region via Turkey to Bulgaria, Romania, Hungary, and Austria; South Stream intended to bring Russian gas under the Black Sea into Bulgaria and further up into Europe. After Crimea: with sanctions on Moscow- an EU-Russia deadlock canceled by both EU (Bulgaria) at end 2014 meanwhile also suspended by Russia itself because apparently "the conditions were impossible".

The energy relationship can best be described as one of mutual dependence. For Russia, dependency means influence and leverage while for the EU it is a critical necessity. Thus, energy has always been the most stable aspect of EU-Russia relations. The Union's energy demand continues to grow particularly because in the newest twelve member states domestic consumption of energy is still relatively low which adds up to an increasing requirement for the whole EU.

The energy policies and securities between the European Union and Russia have, in large part, defined their relationship. The fact is that Russian supplies have steadily grown to account for a share of total EU consumption

24 Serdar Yılmaz, "Doğal Kaynak Milliyetçiliği Bağlamında Rusya-Avrupa Birliği İlişkilerinde Bir Dış Politika Aracı Olarak Enerji", Sibel Turan and Nergiz Özkural Köroğlu (Eds.), Uluslararası İlişkilerde Güvenlik Kuramları ve Sorunlarına Temel Yaklaşımlar, London 2017.

to meet its growing dependence on energy imports. Ukraine sits right at the heart of this dynamic (more on that later), as was so clearly demonstrated in the gas crises of 2006 and 2009 when it showed both its potential leverage over Russia's energy security as well as possible means of disruption toward Western Europe.

The Syrian Civil War and Regional Implications

The conflict in Syria has generated instability in Türkiye's surrounding region, negatively affecting the advancement of energy projects both domestically and in neighboring areas. Additionally, the crisis has put a strain on Türkiye's relations with key energy partners, including Russia, Iran, Iraq, and the United States, which has played an important role in supporting Türkiye as a transit country. These tensions stem from differing perspectives between Ankara and these countries regarding the management and resolution of the Syrian conflict.

Türkiye shares a border with Syria, which stands as the most intricate regional crisis in modern politics. The ongoing conflict in Syria poses a risk to Türkiye's energy security and jeopardizes its bilateral relations with both Russia and Iran. The Assad regime, primarily supported by Russia and Iran, is engaged in combat against the Syrian opposition, which receives backing from Sunni Arab states, the US, and Türkiye. Numerous political attempts to achieve a lasting resolution have repeatedly faltered due to the support Russia and Iran provide to the Assad regime. Conversely, the opposition is fragmented into various factions, while the emergence of the radical Sunni group ISIS has introduced another threat, impacting not only Syria but also Iraq. The current situation in Syria carries the potential for a 'spill over' effect, which could ignite a Sunni-Shia conflict in the Middle East. Regarding Türkiye's energy security, the ramifications of the Syrian conflict may include a possible crisis with Iran that could threaten the existing natural gas supplies flowing from Iran to the Turkish market.

At that point it is also finally look at what America says. Trump about that region said that "We have renewed our friendships in the Middle East and formed partnerships with regional leaders to remove terrorists and extremists, cut off their financing, and discredit their evil ideology. We have crushed ISIS (ISIS) in the war in Syria and Iraq and will continue until they are destroyed[25]"

Eastern Mediterranean Issue

The Cyprus issue may be regarded as Türkiye's most intricate foreign policy challenge, jeopardizing its access to gas reserves in the eastern Mediterranean.

25 Kadir Çelik ve Mehmet Seyfettin Erol, Aralık 2017 Ulusal Güvenlik Strateji Belgesi Bağlamında ABD'nin Karadeniz Politikası ve Türkiye. Karadeniz Araştırmaları, vol.15, no.60, 2018.

Despite Türkiye's substantial efforts to achieve a resolution on the island, the two sides have been unable to identify any common ground to alleviate tensions and create a sustainable settlement. The state of Cyprus was founded in 1960 by Turkish and Greek Cypriots under an international agreement that was backed by the Turkish, Greek, and British governments. However, in 1963, the Greek Cypriots sought to exclude Turkish Cypriots from government institutions, violating both the agreement and the Constitution. In 1974, Greece attempted to annex the island, prompting Türkiye to intervene in line with the 1960 Treaty of Guarantee. Unfortunately, despite significant backing from the UN, the USA, the EU, Türkiye, and Greece, the issue has remained unresolved since the 1970s. The hopes for a lasting resolution were further diminished when the Greek Cypriot Administration (GCA) was admitted to the EU as the State of Cyprus in 2004.

The raid conducted by the Israeli Defense Force on the Mavi Marmara flotilla in 2010 severely damaged Turkish-Israeli bilateral relations. This incident led to a severance of diplomatic ties between Türkiye and Israel, marking it as the most significant crisis in their relationship since the founding of the State of Israel. Conversely, Israel's discoveries of natural gas present an opportunity for collaboration between the two nations, with Türkiye potentially serving as an ideal market for Israeli gas companies. Additionally, gas from the eastern Mediterranean could enable Türkiye to diversify its gas supplies and foster competition against existing long-term gas agreements.

The most favorable outcome for the Eastern Mediterranean would be a positive-sum scenario, in which the rights and interests of all parties are fully respected, rather than a zero-sum approach. For this to be achieved, Türkiye must be appropriately included in regional negotiations. If the situation shifts toward a zero-sum game, existing disputes could escalate, potentially creating long-lasting tensions among stakeholders. There are three main strategic approaches to fostering a positive-sum outcome that benefits all parties. First, Türkiye could be invited to join the Eastern Mediterranean Gas Forum, increasing opportunities for cooperation and synergy. Second, the United Nations could play a facilitative role by organizing intergovernmental discussions and appointing a special representative to guide negotiations. Third, it is essential to recognize the legal rights of the Turkish Cypriot community in intercommunal dialogues on the island, with guarantor states upholding these rights both locally and throughout the broader Eastern Mediterranean region.

Central Asia

The shifts in the global energy landscape following the Russia-Ukraine War have brought European energy security into sharp focus, particularly concerning Central Asia and Türkiye. It is important to note that the European Union,

in coordination with the United States, implemented an oil embargo on Russia while simultaneously exploring alternative sources to replace Russian imports, which previously accounted for approximately 40% of its supply[26].

It began to be considered as a measure of development in the period after World War II, reflecting the meaning of energy in terms of production and consumption. In other words; per capita energy consumption is taken as a sign of development, and the need for energy increases with every passing day. Data from global companies are generally determinant in oil reserves. For example, according to BP 2021 data; the world's oil reserves make up 1,732.4 billion barrels. Looking at regional shares, nearly half of the total world oil reserves are found in one region, which is the Middle East. To compare this over some percentage figures, that region has 48.3% of all world oil reserves. The Middle East region can be likened to Central Asia which also comes forward with its geopolitics and energy resources.

The Caspian Sea is the region particular for a great share of the energy resources among the Turkic Central Asian republics. In addition, three out of five bordering countries to this ancient oil-producing basin happen to be Turkic republics. The approximate holding in the Caspian is about 200 billion barrels of oil—almost three times what is being held within the reserves of the United States, or just about 10 percent of total world reserves—contained within these waters. Among those regional Turkic countries, that adds up to 38.2 billion barrels in proved reserves.The biggest part belongs to Kazakhstan and constitutes 1.7% ,Uzbekistan contains only 0.6%, which makes it self-sufficient in production.In addition U S has 4% world's reserves,Russian-6.2%,Chinese-1.5% while European Union concerned has only 0.1%[27].

Global natural gas reserves are 188.1 trillion cubic meters, the report said. In terms of shares by regions, the largest share is held by the Middle East at 40.3% of the total, followed by the Commonwealth of Independent States (CIS) region with 30.1%. Among independent Turkic countries, Turkmenistan is particularly notable since most of these reserves lie here. It should be underscored that with energy competition in the Eastern Mediterranean-where approximately a total of 2,500 billion cubic meters were discovered during 2009-2019 mining years (Karbuz, 2019)-the worth mentioning fact puts Turkmenistan at increasing strategic importance as it has 13.6 trillion cubic meters of natural gas to offer to the market. The EU has 0.2%, USA 6.7%, and China 4.5% shares in natural gas reserves[28].

26 Cenk Pala, Avrupa Enerji Güvenliğinde Orta Asya. ANKASAM, 2022.
27 BP Statistical Review of World Energy Fussel Fuel Consumption (indicator), https://ourworldindata.org/grapher/fossil-fuels-share-energy, Erişim 17.12.2024.
28 A.g.e. Doğan, s.43.

BP data shows that the Middle East has led the world in oil production, accounting for 31.3% of output. Central Asia and the Caucasus combined contribute about 3.5% of the world supply and have about 2% of global proven reserves. Since 2007, Russia, Saudi Arabia, and the United States have been one of those countries where oil is produced daily at the top; meanwhile, in 2020, daily production from the US reached a high of 18.6%. Even as extraction levels rise, there will still be a deficit; on average, six barrels are consumed for every barrel extracted. The developing countries are raising their demand for oil; by the year 2020, China would have risen to become the second-highest consumer in the world-15.7% after consumption by US Americans at 19.9%. The European Union countries were producing only an average of 394 barrels per day in 2020 while consuming around twenty-seven times more than that production (10,149 barrels of oil)[29].

In the Middle East, which stands out with its oil and natural gas reserves, the decrease in energy resources over time, the change of political balances, the discovery of new energy resources as in the Black Sea and the Mediterranean, or the energy security issue brought to the agenda once again by the Russia-Ukraine War, the turning of energy importing countries to alternative regions has once again become a possible issue. However, as long as the current system is not questioned, similar events may occur in newly added alternative areas. Indeed, Russia draws its power from the energy resources it has in the international arena; Moscow determines the energy security boundaries of many countries, especially the EU, to a significant extent. The energy security discussions brought about by the ongoing Ukraine crisis (April 2022) are proof of this situation. The region's energy resources constitute an important pillar of the Middle East policy of the USA, which does not want to share global leadership. China, the country with the highest global energy demand in recent years, has been integrated into the energy competition from the Middle East to Central Asia.

On the other hand, as in the Middle East example, regions where regional cooperation cannot be developed, where divisions and conflicts occur based on differences instead of establishing cooperation based on similarities, where individual interests turn into struggles for influence, remain weak in terms of security and stability and more vulnerable to external threats. In this context, the energy it possesses also contains the risks mentioned above, to the extent that it contains the potential for Central Asian Turkish states to be integrated into global politics, to increase the country's level of welfare and to have important functions in terms of the development of non-energy sectors. Moreover, the fact that these countries are quite young in terms of

29 BP, https://www.bp.com/en/global/corporate/energy-economics/statistical-review-of-world-energy.html, Erişim 17.12.2024.

establishment and political structure, some of them face serious economic problems, the existence of various problems in terms of security and their relative lag behind in terms of political accumulation and bureaucratic values, leaves the region vulnerable to global competition. Therefore, the importance of Türkiye as a pioneer-leader state should be emphasized in evaluating the potential of the Turkish Republics.

Furthermore, the oil and natural gas resources of Azerbaijan, Kazakhstan, and Turkmenistan hold strategic importance for ensuring the European Union's energy security, a fact underscored once again by the Russia-Ukraine crisis. Consequently, the relationships that Ankara cultivates with these regional states will influence the future trajectory of Türkiye-EU relations. By expanding its influence in the region and fostering cooperation initiated through energy partnerships, Türkiye can also support the broader development and integration of the Turkic Republics.

Russia, China, Pakistan and Iran

In summary, Russia possesses a wealth of energy resources. China functions as an energy producer, importer, and major consumer. Pakistan serves as both an energy importer and consumer, as well as a transit nation. Iran acts as an energy producer and a transit country. Türkiye is involved as an energy importer and transit nation. Consequently, the energy corridor connecting 'China-Iran-Pakistan-Türkiye and Russia' presents a concept that is both strategically and economically feasible. The development of this corridor aligns with the energy goals of these countries.

The proposed energy corridor will be near the Central Asian region, offering opportunities to extend its network to encompass some or all of these countries. Each nation in Central Asia possesses unique domestic, regional, and international circumstances, meaning they cannot simply be viewed as a single entity in discussions related to geoeconomic and geostrategic factors. For the sake of conciseness, this paper will only highlight the potential for the further expansion of the suggested energy corridor.

Should the total production capacity of this region be fully harnessed, it could emerge as a significant contender in the international fossil fuel market. Achieving this necessitates prompt agreement and dedication to a unified energy export strategy that targets both external markets and the Caspian nations.

Nonetheless, this pathway can be realized by establishing a clear strategic policy, enhancing collaboration, creating guiding principles and adhering to them, fostering effective communication, and by honoring and protecting the shared interests of all member states.

Conclusion

The shift in energy geopolitics will prove beneficial for Türkiye; however, it is essential for Ankara to devise robust policies that leverage this transition to its advantage. In the immediate future, Turkish policymakers should focus on three key priorities.

The initial step is to formulate a credible action plan aimed at establishing Türkiye as a reliable energy supplier for Europe. A significant obstacle in this endeavor is Türkiye's purported function as a channel for Russian gas exports and its involvement in Moscow's strategy to evade sanctions. The challenge is compounded by the fact that many European capitals view Ankara's ambiguous relationship with the Kremlin as a concern. Nevertheless, the U.S. government's approval in January 2024 for the sale of forty F-16 fighter jets to Türkiye indicates that alignments between Ankara and its Western partners remain feasible, notwithstanding Türkiye's stance regarding Russia. However, the gas hub presents a distinct situation: for the initiative to succeed, Ankara must devise a means to assure its European clients that no Russian gas is being delivered to them.

Consequently, the second priority for policymakers in Türkiye should be to advance beyond their current strategies for managing the energy transition. Rather than continuing to invest in coal and other fossil fuels, the Turkish government ought to allocate resources toward the advancement of innovative technologies aimed at producing clean energy. By focusing investments on established renewable sources like solar and wind power, as well as exploring and testing emerging technologies such as green hydrogen, Türkiye has the opportunity to diminish its dependence on energy imports, lower its carbon emissions, safeguard its environmental integrity, and strengthen its ties with Europe.

Energy security is essentially the main framework of the country's foreign policy in dealing with oil and natural gas because of its deep consequences on the stability of the economy, military strength, and national as well as international security. There are a host of difficulties available for Türkiye in its quest for energy security that includes meeting increasing domestic demand, inadequate indigenous resources, a very high percentage over dependency from imports, infrastructure weaknesses, possible terrorist strikes on energy assets as well as limited alternative suppliers. It also matters to foreign energy strategy that has an aim to be a regional energy hub. Caspian, Middle Eastern, and East Mediterranean producers basically connect with consumption markets in Europe through Turkish territory— which also brings large economic benefits while strengthening Turkey's geostrategic position at the same time too. Thus, tableilliant has participated actively in numerous international

pipeline initiatives plus other sundry energy projects to thus solidify this role. At last, regional geopolitical events keep on having a great effect on Türkiye's dual role both as an importer and as a transit country. Variations in supply, new energy corridors, and regional conflicts determine the strategic calculus of Türkiye's external oil and natural gas policies. Therefore, these three factors —energy security, hub ambitions, and regional dynamics— are the main components that synthesize the outline of Türkiye's approach toward foreign energy strategy.

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